ServiceMinder|Pay

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Overview

Did you know the average franchisee pays around 3.5% in payment processing fees, which can limit growth potential? That's why we're offering a solution to help our clients eliminate these high fees—**serviceminder|pay**. With **serviceminder|pay**, we're not just reducing costs—we're changing the way you manage payments, boosting efficiency, visibility, and profitability.

As a trusted franchise supplier for over 12 years, supporting nearly 60 brands and more than 2,500 franchisees, we've continuously tackled our clients' challenges with a comprehensive approach. Now, we're going a step further to remove another major obstacle from your brand's daily operations: the hassle of payment processing fees, visibility, and reconciliation reports from third-party gateways.

With our new solution, serviceminder users can benefit from:

- Get started with no commitments, payments included, and no minimums or monthly fees
- Instant approval with prefilled applications
- Direct support from the service minder client success team no extra vendor to manage
- Faster access to your funds
- Reconciliation and reporting all in one platform
- Seamless integration with QuickBooks Online
- Instant approval and clear, transparent pricing

Sign up for serviceminder | pay!

This article will review:

- Sign Up Process
- Migrating Tokens to ServiceMinder Pay
- Lossless Token Transfer
- FAQs

Sign Up Process

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Steps to Sign Up

- 1. Navigate to Control Panel > Integrations > Payments.
- 2. Check the box to "Accept Credit Cards and eChecks" if not already enabled

3. In the **Payment Gateway** section, click the "**Apply for serviceminder**|**pay**" link to start your application.

Some information in the application will be pre-populated for you based on what you have entered into our system. Please verify that all information is correct and matches your business legal entity details before proceeding.

- 4. Complete the short digital application.
 - a. You'll be asked to enter:
 - i. Your business information: Legal name, DBA name, address, phone number
 - EIN (Employer Identification Number): 9 digit federal tax ID number for businesses
 - MCC Code (Merchant Category Code): a four-digit code used by credit card companies to classify businesses based on the type of goods or services they provide. If you are part of a franchise brand, this will be pre-populated for you.
 - Average Ticket, Highest Ticket, and Monthly Payments Volume: These fields refer to the estimated transactions you anticipate doing. These fields may be pre-filled for you using past transaction history in serviceminder. Please review them for accuracy.
 - ii. Merchant Contact information: The point of contact in your business regarding your payment processing.
 - iii. Business owner details: name, email, phone, SSN, and ownership percentage
 - The ownership fields should reflect the actual owners/partners registered for the business entity
 - The ownership percentage must add up to 100% and match your original business paperwork
 - Make sure to use your legal name. If you use a nickname and you have used that as your username in serviceminder, that information might auto-populate in the Name field. Double check to make sure that information matches what you have on file as the owner of your business.
 - iv. Bank account details for depositing funds

5. Review and Sign.



When the next page loads, **stay on that page.** There will be a link that you follow to officially **submit** the application.

7. Follow the link to finish submitting your Application.



8. **Submit the Application:** Once approved, the integration is enabled automatically and you can begin accepting payments.

You may be prompted by Forward, the payment processor, to link your bank account with Plaid to receive your payouts. You can do this now, or skip and come back to it later. Visit our article titled <u>ServiceMinder|Pay - Linking Your Bank Account to Forward</u> for more information when you are ready to do so.

9. Confirmation and Setup Completion: After submitting, you'll receive a confirmation email. Once approved, serviceminder|pay will be active in your account.

- You might notice a new "**Pay**" section under your Administration or Reports menu this is where you can view service**minder**|pay transactions and payouts.
- Other than that, nothing in your day-to-day use of service minder changes for taking payments.
- You'll still create invoices and proposals the same way, and customers will pay through the same client portal or links as before (the switch is seamless to them).

10. **Start Accepting Payments:** You're all set! New payments will now be processed through service**minder**|pay. You can accept credit cards and ACH (eCheck) payments immediately. Funds from transactions will be deposited into your account typically within 1–2 business days, meaning you get paid faster than many traditional processors.

11. Verify Activation:

- Run a \$1 test transaction and verify via serviceminder | pay reports.
- Update invoice templates to use serviceminder | pay links.
- During migration, dual gateways will remain active. New cards will route through service **minder**|pay; existing processor cards will continue working until replaced as per the process below.

Best Practices for Application Submission

- 1. Use your legal name, not nicknames or usernames
- 2. Include owners only, not all users or those who want access to payments
- 3. Ensure your EIN and address match IRS records
- 4. Verify bank account and routing numbers
- 5. Double-check ownership percentages total 100%
- 6. Avoid mismatched SSNs or invalid MCCs
- 7. Annual Volume Field: This field projects the total transaction volume you expect to process over the coming

12-month period by carrying forward the sum of transactions from the most recent 12 months. In other words, it assumes that the coming year's volume will mirror (or be adjusted from) last year's performance. For example:

- a. Period: Jul 2024 Jun 2025
- b. Transaction Volume: \$750,000
- c. Notes: Sum of all processed transactions Projected Jul 2025 Jun 2026 \$750,000 Carried forward from the prior 12 months
- 8. Average Ticket Field: This field represents the median transaction value over the most recent 12-month period. By using the median rather than the mean, it reflects the "typical" purchase size.
- 9. **High Ticket Field:** This field captures the largest single transaction value over the most recent 12-month period, highlighting your biggest purchase outlier.

If flagged, your application may pend for manual review. In that case, underwriters may request supporting documents (e.g., utility bill, business license).

Best Practices After Enrolling

- Update invoice templates to use the serviceminder | pay payment link
- Save cards on file for recurring or large ticket jobs
- Consider enabling surcharging to offset card fees (up to 2.99%)

Multi-Gateway Coexistence & Token Flexibility

You can use service**minder**|pay alongside your existing gateway, no downtime or waiting - see Lossless Token Transfer below for more information

- Legacy tokens remain active until replaced or expired
- Avoid disrupting recurring payments or saved cards during transition
- Refunds must still be processed through the original processor for legacy transactions

Migrating Tokens to ServiceMinder Pay

If you're switching your payment processing to **ServiceMinder Pay**, you may need to transfer existing card tokens from your current provider. The process varies depending on your current processor.

TSYS

If your current provider is TSYS, service minder can assist with initiating the token migration process.

- 1. Download Existing Tokens
 - Visit this Card Tokens Report link to download and extract current tokens using the Contact ID.
 - This ensures each token is correctly matched to the appropriate contact in your system.
- 2. Submit a Support Ticket

- Email: support@serviceminder.zendesk.com
- Include the CSV file with token data from the report.
- 3. ServiceMinder Support Coordinates With Processors
 - Our team will contact TSYS to request the token extraction.
 - Once received, our team will submit the file for re-tokenization.

Heartland

- 1. Complete the attached Liability Waiver Form @
 - a. On the form, the **Terminal ID Number** field can be left blank.
- 2. Send your completed form to wade.speelman@e-hps.com and let him know you are requesting token transfer from Heartland to Forward.

For All Other Payment Providers

If you're migrating from Authorize.net, QuickBooks Payments, or another provider, the merchant (you) must initiate the token transfer.

What You Need to Provide

Your processor should give you a file that matches our standard token import format:

Contact ID, New Profile ID, New Payment ID

Download your tokens from ServiceMinder to map them correctly to contacts.



If your file includes only old-to-new token mappings, use Excel's **VLOOKUP** to rebuild the file using your current token report to match tokens to contacts.

Token Migration Format Guide

Column Name	Description
ContactId	Our contact Id available from the token download you used to initiate the token transfer.
	If not provided, the next two columns must be present.
OldProfileId	The existing Profile Id. Both Profile and Payment fields are required if contact Id is not
	present. If Contact Id is included, the existing Profile/Payment Ids are ignored.
OldPaymentId	The existing Payment Id
NewProfileId	The new contents for the Profile Id field (required)
NewPaymentId	The new contents for the Payment Id field (required)
ACH	0 for card, 1 for ACH (so we know what type of token it is). If missing, we assume card.
Last4	The last 4 digits of the account number, if missing, card numbers may not display depending on
	the gateway, but charges should still be able to run successfully.

Column Name	Description
Expiration	The expiration date in MM/YYYY or MM/DD/YYYY format
NameOnCard	The card holder's name

Lossless Token Transfer

Lossless token transfer allows you to switch from your existing payment gateway to service**minder**|pay without losing saved payment methods or requiring customers to re-enter their card details.

This dual-path setup allows for a smooth, interruption-free transition, giving your business time to gradually shift everything to the new platform while maintaining payment continuity for existing customers.

How It Works

- When you enable service **minder**|pay, any existing payment tokens in your account are tagged as part of the old gateway
- These tokens continue to process transactions using your previous payment gateway, even after service**minder**|pay is active.
- New payment information captured after enabling service **minder**|pay will be processed through the new gateway (Forward).
- Both systems work in parallel—serviceminder|pay for new transactions, your old provider for legacy tokens.

What You Need to Do

- Keep your old gateway active to ensure existing tokens can still process payments.
- Don't delete or deactivate tokens in the service**minder**|pay system; they'll continue working as long as the old gateway account remains open.
- Over time, as customers update their card info or save new payment methods, these will automatically route through ServiceMinder Pay.

Important Caveats

- Refunds for transactions processed on the old gateway must still be handled through that provider.
 - Reporting for old transactions will not appear in the service **minder**|pay dashboard, but will remain visible in your previous gateway's reporting tools.

FAQs

<u>Click here</u> to read through frequently asked questions and a glossary of terms about serviceminder pay.